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AUTHOR Peters, Cynthia; And Others
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ABSTRACT

The need to plan for operating and service patterns and to establish priorities for services to readers in the new Reference and Bibliographical Center at the Newberry Library guided this self-study. From December 1983 to August 1984, 32 staff members (grouped into 1 study team and 4 task forces) investigated the critical issues of bibliographic access, services, service philosophy, and resources. The study teams' 30 recommendations are arranged in 3 chronological implementation phases: 18 to be implemented in the fall and winter of 1984-1985; 9 to be accomplished in 1985; and 3 to be completed in 1985 and beyond. Recommendations and outcomes are addressed according to four basic issues: (1) public awareness and public information (including orientation, security, public programs, and exhibits); (2) services on the new 3-floor plan (including day-to-day reader plans, open shelf and satellite collections, and hours of service); (3) staffing and change (including staffing of reader services in renovated facilities); and (4) miscellaneous recommendations (including terminal access, book return stations, and opening after the renovation). The director's charge, a listing of participants in the study, and appendices providing reports on the library's building operations and public services at the time of the study are included. (THC)

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PUBLIC SERVICES STUDY REPORT

ONE OF A SERIES
of Self-Studies
and Research Projects
funded by the General
Electric Foundation
and administered by the
Office of Management Studies,
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PUBLIC SERVICES IN RESEARCH LIBRARIES:

A SELF-STUDY

The Newberry Library

Office of Management Studies, Public Services Study
Funded by the General Electric Foundation

August, 1984

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EXPLANATORY NOTES ON THIS PUBLICATION SERIES

Final reports from self-studies and research projects of the Public Services Study sponsored by the General Electric Foundation and administered by the Office of Management Studies, Association of Research Libraries, will be made available within this publication series as they are issued in 1984-85.

This report was issued by the Newberry Library Study Team at the conclusion of its Public Services Study. It includes all of "PART I" listed in the Table of Contents. PART II -- appendices that include Task Force reports and background materials -- will be photocopied upon demand, for the prices indicated below.

Appendix I (A-B-C-D)	46 pages	$15.00
Profile of the Newberry Library; Newberry Library Building Profile and Planning Assumptions for the Reference and Bibliographical Center; The Newberry Tradition of Public Services; Description and Inventory of Public Services		
Appendix II (A)	24 pages	$10.00
Services Points, Traffic and Communication		
Appendix II (B)	88 pages	$15.00
Bibliographic Access and Control		
Appendix II (C)	20 pages	$10.00
Reference Collections		
Appendix II (d)	42 pages	$15.00
Staffing and Operations		

Additional copies of this final report are available for $15.00 All materials require prepayment, with checks made payable to "ARL Office of Management Studies." Please specify exactly which reports you are ordering, and refer to the Newberry Public Services Study. Send to: Office of Management Studies, ARL, 1527 New Hampshire Ave., N.W., Washington, D.C. 20036. Prepayment is required. Outside the U.S. and Canada, add $5.00 per order for postage and handling.

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THE PUBLIC SERVICES STUDY

Academic libraries today face the fundamental challenge of responding more effectively to the information needs of their users in a period of increased information resources and decreased or stabilized economic resources. In this environment, academic libraries must move toward the wisest use of their resources in identifying and serving the changing needs of users, in becoming more active partners in the instructional and research interests of their universities, and in more actively facilitating the transfer of information from locations beyond their walls to their own clientele. The challenge includes the need to take advantage of new and emerging capabilities such as on-line bibliographic search services, new catalog formats, and microform and non-print publishing media.

To address this set of concerns, the Office of Management Studies has developed the Public Services Study, which individual academic libraries can use to assess and improve their current services programs. The study is based upon the premise that academic libraries are experiencing a number of fundamental internal and external pressures that create a need to review priorities and develop new approaches to change. The goals of this study include:

*to provide tools to libraries enabling them to determine and analyze user patterns, needs, and satisfaction levels;

*to provide assistance to libraries in relating the use of the library to current operating services policies and practices;

*to design performance measures that can be applied in evaluating current services programs and in planning improvements;

*to provide guidelines for libraries to use in designing new services activities or remodeling current ones;

*to suggest improved methods for promoting the use of library services and enhancing the role of the library on the campus.

The basic strategy employed in the Public Services Study is assisted self-study. While assisted self-study resembles traditional self-studies in some respects, it differs on three important dimensions. First, assisted self-study involves collecting information and then analyzing it within a framework as first steps toward improvement. Second, assisted self-study promotes the learning and development of all persons involved through their experiences in conducting the study. This means that the staff develops a broader understanding of the impact of services concerns on the ability of the library to meet its obligation to users. And third, libraries participating in assisted self-study receive specialized resource materials, training, and consultation assistance usually not provided in traditional studies. This ensures timely efficient execution of what can be a demanding complex activity.

In accordance with its problem-solving philosophy, assisted self-study employs a group approach to analysis, using library staff, faculty, students, and institutional officials. Two types of groups are involved, a study team and task forces. Primary responsibility rests with the study team, which defines the scope of the study, sets goals, plans, organizes and conducts analyses, draws final conclusions, and designs the implementation program. The study team also creates the task forces to assist in collecting and analyzing data and in developing options for resolving problems. The task forces are responsible to the study team and their work is coordinated by the team.

The major components of the study are a general situational analysis, and specific modules on description and inventory of services, management of services, assessment of services needs and performance, and interaction with the environment. Data gathering and analysis is conducted within each of these components. Then, a final action planning stage creates recommendations, implementation strategy, and the final report. The entire study takes 9 to 12 months. Individual modules can be conducted in less time.

The study is being made available as a part of the Academic Library Program, which is used by libraries willing to commit staff time and some financial resources to the process of assisted self-study. The program draws upon several previous studies developed and operated by the Office of Management Studies including the Management Review and Analysis Program (MRAP), the Collection Analysis Project (CAP), the Academic Library Development Program (ALDP), the Planning Program for Small Academic Libraries, and the Preservation Planning Program.

Financial and/or design support has come from the General Electric Foundation and from members of the Association of Research Libraries (ARL), a non-profit educational organization of 117 major research libraries in the United States and Canada.

PREPARED BY OMS STAFF
August 1984

OFFICE OF MANAGEMENT STUDIES

ASSOCIATION OF RESEARCH LIBRARIES 1527 New Hampshire Avenue, N.W., Washington, D.C. 20036 • (202) 232-8656

September 1984

EXECUTIVE SUMMARY

The Public Services in Research Libraries Self-Study at the Newberry Library involved 32 staff members grouped into one Study Team and four Task Forces. Employing the services of two consultants from the OMS (Duane Webster and Patricia Swanson), the study took place from December 1983 to August 1984. One of the overriding contexts for the study was the need to plan for a new Reference and Bibliographical Center under renovation. Critical issues that were investigated, as defined by L.W. Towner, director, in his charge to the Study Team, were bibliographic access, services, service philosophy, and resources.

Some 30 recommendations resulted from the study -- 18 to be acted upon within a few months, nine to be accomplished in 1985, and three to be completed in 1985 and beyond. In the final report, recommendations and outcomes are addressed according to four basic issues:

Public Awareness and Public Information (including orientation, security, public programs, and exhibits);

Services on the New Three-Floor Plan (including day-to-day reader plans, open shelf and satellite collections, and hours of service);

Staffing and Change (including staffing of reader services in renovated facitities);

Miscellaneous Recommendations (including terminal access, book return stations, and opening after the renovation).

The Final Report begins with the director's charge, a listing of participants in the study, and an introduction from the Study Team, Cynthia H. Peters, chairperson, that briefly discusses the background and hopes for the study. An Executive Summary introduces and sets out timelines for the recommendations that follow. Appendices provide reports on the library's building, operations, and public services at the time of the study, as well as complete task force reports and recommendations.

Prepared by OMS Staff

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PARTICIPANTS IN THE PUBLIC SERVICES SELF-STUDY

OMS CONSULTANTS

Patricia Swanson
Duane Webster

STUDY TEAM

Cynthia Peters, chair
John Aubrey
Jean Donaldson
Paul Gehl
Edward Meachen
Debbie Pluss
Karen Skubish

TASK FORCES

SERVICE POINTS, TRAFFIC AND COMMUNICATION

Karen Skubish, Chair
Gerard Jendras
Michael Kaplan
Karen Klutho
Emily Miller
Carolyn Sheehy
David Thackery

BIBLIOGRAPHIC ACCESS AND CONTROL

Debbie Pluss, Chair
Caroline Brettell
Diana Haskell
Robert Karrow
Cynthia Peters
Richard Seidel

REFERENCE COLLECTIONS

John Aubrey, Chair
David Buisseret
Bonnie Jo Cullison
John Jentz
Treadwell Merrill
Lucille Wehner

STAFFING AND OPERATIONS

Edward Meachen, Chair
Margaret Brenneman
Adrian Capehart
Sandra Hunnicutt
Richard Meredith
Margaret Norton

021-07-45a

November 23, 1983

TO: Public Services Study Team

SUBJECT: Charge to Study Team for ARL-OMS Self-Study of Public Services

FROM: L. W. Towner

Thank you for agreeing to serve on the Study Team for the Association of Research Libraries' Office of Management Studies Assisted Self-Study of Public Services at the Newberry Library. I am happy that, together with Duane Webster and Pat Swanson, you will be doing work that can serve as a model for such studies in other independent research libraries.

Rationale for Study

The new Reference and Bibliographical Center is part of the current phase of renovation and we need to plan for operating and service patterns and establish priorities for services to readers when it opens and when the renovation of reading rooms is finished. Plans for the renovation began in 1970, and in the course of time, plans have changed, recommendations and decisions have been made, and some issues have been identified but not resolved. Now we need to sort through it all and decide how we will operate on opening day, so to speak. In the period of planning many other changes have taken place which may affect public services here: our public, both lay and scholarly, has grown; our public programs have expanded; organizational changes have occurred; new people have joined the staff; changes in the field of higher education and in popular interests have altered the Library's audience. Planning studies and various task force reports have laid out recommendations and solutions to problems. This study is an opportunity to synthesize a plan for services to readers building on past thinking, accumulated experience, present resources, and future hopes and hunches.

Issues to be Investigated

The study team will plan the study and will, in the course of its work, identify and explore many issues. I suggest issues here for guidance only. General issues to explore are the institution's mission as expressed in various reports and planning documents, collection policy with particular emphasis on reference and open shelf collections, and readership or audience. The critical issues and those that should be the focus of the study are:

1. Bibliographic Access--The future of manual files and catalogues, computer-based systems for access to Newberry collections, database access to other library collections, and other means of access to library materials.

2. Services--What services does the Library now offer? What services are desirable? What services have outlived their usefulness?

3. Service Philosophy--How active are our services? Do we provide specific information or instruct people in how to find it themselves? Does level of service vary for different audiences?

4. Resources--What human resources do we have for our public services program (this should include a skills inventory) within public services units, in other operating units, in research centers? What do we need?

Role of Participants

The study team and task forces which study more specific areas are to study issues related to public service in the renovated building and to develop a phased plan for development of service to Library users over the next five years. They will do this by investigation--pulling together information from various sources and by various means; analyzing the information and synthesizing ideas; developing a plan with specific step-by-step recommendations to be submitted to me. Although public service is a broad area, the immediate focus needs to be on service to users of the collections in the narrow sense as readers, scholars, correspondents, etc. rather than the broad sense as visitors, exhibit viewers, bookshop patrons, etc.

The study team and its task forces may have access to institutional planning documents, departmental reports, grant proposals, and Newberry archival material. They may interview staff, fellows, and readers if such interviews will further their work; and they may administer questionnaires and surveys. After the initial phase of the study, the study team will recommend staff members for task forces and develop the charge for each task force.

Time

I understand that the work of the study team will begin December 1 and that the final report and recommendations will be submitted in May 1984. The study plan and appointment of task forces should be completed by late January. Other dates and deadlines will be developed by the study team.

Expected Outcomes

The study team will develop a study plan in outline form; this will be discussed and agreed to with Mary Wyly and Joel Samuels. Then they will write a charge for each task force. Each task force will develop interim reports and final reports and recommendations. Then the study team will synthesize these recommendations into a final report--to be a phased plan for public services--with particular emphasis on the reorganized configuration of the Reference and Bibliographical Center and the reading rooms.

Commitment of Library Administration

Joel Samuels, Mary Wyly, and I will follow the course of this study with interest, and we look forward to meeting with you and with the OMS support staff as it proceeds. In response to the study I make the following institutional commitments:

1. Each recommendation of the final report will be responded to--accepted, modified, rejected, or deferred for funding.
2. Elements of the plan, with phasing to account for start-up costs or other factors, will be integrated into institutional objectives and planning documents.
3. Elements of the plan will be phased into fiscal planning (long term and annual) for budgetary and/or fund raising purposes.

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INTRODUCTION

What follows is the final report on an assisted self-study of the Newberry Library's public services conducted from December, 1983 through August, 1984. The study was undertaken as a pilot for an Association of Research Libraries' Office of Management Studies program and a general review of the Newberry's public service history. It is also, because of its timing, an important document in the planning process for the "new Newberry," at that challenging moment in our history when, after a multi-million dollar building and renovation program, we reopen to the public. One of our goals was to assure that the new face we present to the readership is not merely one of marble, bronze and glass but includes, as well, an informed and revitalized public services staff who are served by systems and tools that will make the Newberry easy, comfortable, and pleasant to use--a treasure trove as always, but not of treasure buried out of sight and difficult to access. Specific goals were: to assess the public service history of the Newberry; to develop a clear but flexible and public-minded service philosophy; to describe and understand our readership; to devise plans for opening and maintaining our new three-floor reader-service area; to make specific recommendations on catalogues, reference collections, services, and staffing for all public service areas.

Our method of proceeding was much facilitated by a study manual, in draft form, from the Office of Management Studies, and by the help of consultants Duane Webster and Patricia Swanson. The study team was appointed by the library administration, and prepared a series of preliminary reports on the present and past state of Newberry services (see Appendix I). These served as a starting point for the work of

four task forces, on service points, reference collections, bibliographic access, and staffing. Each of these task forces, drawn from a broad spectrum of the Library's staff, did many reports, interviews and studies, summarized in their final reports (Appendix II). The study team then set about the task of collating the results, resolving conflicts and making comprehensive recommendations as detailed in this final report.

As a result, this document can be used in several ways. An executive summary offers a chronological implementation schedule of recommendations as a whole. This is a reference table only and does not deal with issues, only with some of the answers. The main body of the report attempts to summarize our recommendations in context, with major issues clearly indicated and areas of disagreement honestly stated. It is intended to be a whole, and useable as such. Even the study team's final report, however, can be filled out and made more fully understandable by the wealth of fact and opinion embodied in the preliminary reports and task force documents. The full flavor and value of the project resides, then, in the whole body of documents we now present. As a whole, they can tell what a constructive experience the study has been. Worth noting too, is the fact that many useful and valuable suggestions made by the staff are included in the task force reports. Many of these could not be included in our report, but unless we take specific issue with them we intend to endorse them and recommend that the key Library Officers give them careful consideration.

The team would like to acknowledge several people in particular. Library Officers Bill Towner, Joel Samuels, Dick Brown and Mary Wyly gave unstintingly of their knowledge, experience, enthusiasm and advice. They have been frank, have kept us working hard, and, we think, working up to a high standard. The task force members were

also great stimuli, showing us as they did the firm dedication to service and the hard-nosed grasp of the facts of everyday operations which have made the Newberry the public-spirited private library it is.

Special thanks are due to Duane Webster and Pat Swanson for many, many services: sage advice, encouragement, high diplomatic skills, and especially the ability never to be non-plussed even by the high fettle and spicy language of many of our meetings. Sincere thanks are also due to Carolyn O'Hara, Project Assistant, for her faithfulness, patience and good humor.

Any examination of self will encounter strong feelings--even hard feelings--but the undersigned members of the public services study team are concluding our work in the conviction that it has been a constructive experience. We have learned much and have already seen positive results of our work in our own areas of the Newberry. We trust the key Library Officers and all our colleagues will find what follows a useful guideline for setting priorities, implementing policies, and making hard decisions.

Respectfully,

Cynthia H. Peters, Supervisor, Reference Services (Study Team Chairperson)
John Aubrey, Reference Librarian, Special Collections
Jean Donaldson, Special Collections Librarian
Paul F. Gehl, Associate Director of Research and Education
Edward Meachen, Reference Librarian, Local and Family History
Deborah Pluss, Cataloguer, Technical Services
Karen Skubish, Supervisor, Main Reading Room

EXECUTIVE SUMMARY

In order to make our narrative report clearer and more understandable, we here offer an overview of the study team's recommendations, arranged in three chronological implementation phases. This chronology is intended only to provide a larger perspective on our recommendations and not to prescribe a fixed order, to create a set of priorities, or to provide a checklist of our successes and failures. It should, however, guide the reader to further observations on each issue covered in the main body of the report. For the logic of each recommendation readers must look further than this.

In some degree this list is highly idealistic. Realism demands that each recommendation be taken next before the pertinent department or section heads and examined as to implementation in concrete terms. The list here is also made independently of cost and funding considerations and service priorities that are determined by other than public ones: these issues we gladly leave to the key Library Officers.

A. Now and Soon: Fall and Winter of 1984-85.

Certain of our recommendations are appropriate for immediate implementation, or need to be considered promptly if they are to be useful. Here is a list, with page references, in the order of their presentation in the report:

1. Orientation/Admissions Post (report pp. 2-4)
2. Bookshop (report, p. 5)
3. Fellowship Orientations (report, pp. 5-6)
4. Card Catalogue placement (report, pp. 9-13)

5. Selection of open shelf collections (report, pp. 13-14)

6. Circulation procedures for reference materials (report, p. 14)

7. Open shelf journal selection and circulation system for bibliographers (report, pp. 15-16)

8. Establishment of new service hours, possibly excepting Special Collections (report, pp. 19-21)

9. New procedures for after-hours access (report, p. 22)

10. New positions in: Reference and Bibliographical Center, Local and Family History, Main Reading Room, Special Collections (report, pp. 24-27)

11. Stacks Manager position (report, p. 29)

12. Creation of a staff sharing policy (report, p. 30)

13. Creation of a staff development policy (report, pp. 30-33)

14. Revision of staff handbook (report, p. 31)

15. OCLC terminal for Reference and Bibliographical Center (report, p. 33)

16. New book return stations (report, p. 33)

17. New call slips (report, p. 34)

18. Reference and Bibliographical Center telephone (report, p. 34) and Switchboard orientation (p. 35)

B. The Coming Year: 1985

Other issues and recommendations are made for 1985 and should not be delayed longer:

1. Completion, updating and display of skills inventory information (report, p. 6)

2. Inauguration of Exhibits program (report, p. 7)

3. Security evaluation of Reference and Bibliographical Center collection (report, pp. 14-15)

4. Evaluation of materials in present satellite collections not earlier removed to the Reference Center (report, pp. 16-17)

5. Reclassification of open-shelf reference materials (report, pp. 17-19)

6. Establishment of or experimentation with new Special Collections hours (report, p. 21)

7. New positions (report, pp. 28-29)

8. Implementation of staff sharing (report, p. 30)

9. Implementation of staff development policies (report, pp. 30-33)

C. Longer Term: 1985 and Beyond

Some specific recommendations concern the next few years more than the near term:

1. Library Archivist's position (report, p. 28)

2. Conservation Bibliographer position (report, p. 29)

3. Personnel Officer (report, p. 31)

019-29-12

FINAL REPORT

Public Services Study Team

The Newberry Library

Office of Management Studies, Public Services Study

16 August 1984

The charge to the Public Services Study Team (PSST) was to develop proposals to ensure the success of public services operations in the newly renovated building. We of the PSST are fully aware that there is no formula for a perfect style of operations, and that the smooth operation of any institution is an exercise in continuous change. We present the following as our best recommendations today, based upon the best analysis we can make of the past and the strong impressions we have of the future. We know that these recommendations will be considered seriously by key Library officers, and we are available for discussion or explanation as you consider implementation.

This report addresses a number of separate issues and therefore is not structured as continuous prose. The arrangement of issues will be into four major groupings: I. Public Awareness and Public Information, II. Services in the New Three-Floor Plan, III. Staffing and Change, and IV. Miscellaneous. Within each grouping an issue will be briefly defined, then proposals will be presented for consideration.

I. PUBLIC AWARENESS AND PUBLIC INFORMATION

In the early stages of the Study, a readership profile was developed. This profile is included in "The Newberry Tradition of Public Services," attached to the final report as Appendix IC. There are many types of readers at the Newberry, but basically they can be divided into two major groups: lay and scholarly. While their service needs differ substantially, all are legitimate users of our collections and are entitled to service which is equal in quality

though different in form. At the same time, we realize that our staffing resources are limited, and that we are here, not to teach people how to do research, but rather to aid them in the use of our Library.

ISSUE: Orientation and Admissions

We must next consider how to make their introduction to the facilities thorough and efficient. The Newberry is different from other libraries our readers have used. It has closed stacks, is extremely conscious of security and preservation, has several unusual call number systems, is an independent research library sponsoring daily activities other than reading, and has slightly restrictive admissions rules.

PROPOSAL: Establishment of Orientation/Admissions Center

We propose the creation of a permanent Orientation/Admissions Center in the Lobby of the Cobb Building. This Center should be located outside of the security perimeter (brass railings and the security desk) and be immediately apparent upon entry to the building. The Orientation/Admissions Center should be staffed during the hours readers are admitted to the Library and paging is in progress. Hours for the post should be 9:00 a.m. to 7:30 p.m., Tuesday through Thursday, and 9:00 a.m. to 5:00 p.m., Friday and Saturday. If the year-round staffing of the evenings hours is problematic, we suggest staffing the Center seasonally to coincide with the adult education programs and the heavier use periods of the year by the rest of our readers. This post should handle evening admissions for classes and

events, allowing the security attendants at the kiosk to focus on the traffic through the entrance/exit gates.

Essential, general information about the Library will be distributed at this post. Other, more specific information should be distributed at appropriate service points throughout the Library. Present Newberry publications and handouts should be revised and updated. Materials should be professionally printed and well designed. A one-page map of the building should be one of the first new handouts developed. Eventually a film or slide show should be produced to inform visitors of the scope of the collections and the history of the institution, although this is not a recommendation for the immediate future.

The post should be staffed by intelligent, personable, and patient people with knowledge of the policies and procedures of the Newberry. They should be familiar with other area institutions to make appropriate referrals. We recommend a paid staff in preference to volunteers. The amount of training required is great, and length of commitment is therefore important. If volunteers must be used, a sophisticated education program is needed to train them and must include our institutional policies and procedures.

In the past, Orientation/Admissions has been combined with the the bookshop. Doing so eased staff shortages and was reasonable insofar as the activities were mainly supervising admissions procedures. We encourage separation of and adequate staffing for both of these important public relations stations. However, if the location of the Orientation/Admissions Center is near the bookshop, cooperation is an important consideration.

Various locations in the lobby have been discussed by the PSST. We do not recommend placement within the bookshop because of insufficient space. Just outside of the bookshop, inside of the cloak room in front of the free-standing panel, or a movable unit were options considered. The design of the unit should be harmonious with the other fixtures in the lobby, have ample yet efficient storage and display surfaces, and provide a writing surface other than the top of the station for readers to fill out application forms. A table similar to the consultation tables in our card catalogue room, or a short row of chairs with writing surfaces similar to those used in classrooms are appropriate choices. An extensive list of brochures and handouts to be available both at this station and throughout the building as a whole is included in the Service Points Task Force report, see Appendix IIA, pp. 18-19. The responsibility for operating this post should be in the Library Services Division.

ISSUE: Security Checkpoint: Kiosk

Once a user has been processed by the Admissions/Orientation Center, he or she next proceeds through our security checkpoint, i.e. kiosk.

PROPOSAL: We envision the directional and informational questions will move from the kiosk to the new Orientation Center. The security station will then be better able to enforce the rules for use of the Library and to check materials as they are carried in and out of the building. A large part of our collections, even in the general collections, are rare, and because the market for antiquarian books is a lucrative one, we must effectively prevent theft.

ISSUE: The New Bookshop: Staffing and Administrative Affiliation

PROPOSAL: Another committee is currently studying the bookshop, and therefore this report will limit suggestions to those relating to readers as they are introduced to the Library.

The bookshop must be one of our best public relations stations. We recommend a well-staffed, well-stocked shop. The stock of the shop should gradually be built up to be representative of our collections and subject coverage. We take the same position on volunteers for this department that we did on the Orientation/Admissions Center; they can be of great use here, but only with thorough training and strict supervision.

ISSUE: Public Programs: Adult Ed/Development/Exhibits, etc.

PROPOSAL: Present evidence shows these programs will continue to grow, introducing new Library users. We encourage staff who run these programs to learn all they can about the Newberry: its history, service philosophy, collections and programs. A training program designed for these staff members could be used for volunteers as well.

ISSUE: Improving Orientation for Scholarly Readers

PROPOSAL: The Newberry Library has a special group of users, those on Fellowship, who require a more extensive orientation program. At present the Office of Research and Education provides these readers with a Fellow's Handbook and other orientation material on arrival,

and gives them a detailed tour which includes introductions to key staff. This works well, if a bit haphazardly. Some improvements could be implemented easily: (1) develop a special reference brochure geared to the scholarly reader, including a basic bibliography on the Newberry's collections; (2) seek broader input on revisions of the Fellow's Handbook, especially from the Reference staff and other public services staff; (3) distribute orientation materials before the fellow's arrival; (4) arrange for a regular reference department orientation for each fellow or group of arriving fellows; (5) create a notebook of fellows' reports, arranged by subject, for reference by new readers, kept both at the Office of Research and Education and at the reference desk.

ISSUE: Using the Skills and Service Inventories Made by Study Team and Task Forces

PROPOSAL: Creation of both a printed non-public guide to subject specialists to be kept at the reference desk, and a briefer, framed, wall-mounted directory of subject specialists. The wall-mounted directory should be on the third floor, outside of the R&B Center. Both directories should be compiled by the reference staff, in consultation with the Office of Research and Education. Scholars will be included, but there is an understanding that the staff will be called upon first.

ISSUE: Exhibits Program

PROPOSAL: The exhibits program is yet another way of informing about the Library and its holdings. In light of the increased gallery space, and the anticipation that exhibits will be more widely advertised, we advise more sophisticated, exhibits of greater public interest than in the recent past. Exhibits need to maintain an emphasis on historical and critical issues, but must be more accessible to non-scholarly viewers. The exhibits program is not now formalized. A committee exists for review of the program. The PSST urges the appointment of an Exhibits Coordinator to take the responsibility for planning and preparation. Current exhibit practices take staff members away from regular tasks for months. Staff members should continue to have the opportunity to prepare exhibitions, because they have the subject expertise, and an exhibit preparation is important for professional development. However, most staff members are not experienced in the creation of visual displays, nor with conservation requirements re display and selection. Furthermore, all have different writing styles. A Coordinator would have these skills and can also guarantee the program is planned out in advance; most other institutions have the exhibits calendar mapped out for the next three to five years. This kind of long-range planning allows a better publicity program, borrowing time for items of interest from other institutions, and leaves time to create better displays. A staffing recommendation for this program appears later in this report; see pp. 28-29.

II. SERVICES ON THE NEW THREE-FLOOR PLAN

ISSUE: Day-to-day reader needs

All aspects of Library activity are elements of service. Crucial to service is a staff with knowledge of the collections and the subjects in those collections. At the Newberry, subject specialists are dispersed throughout the building in various departments and research centers. To maximize staff participation in public services, we must include staff from the entire Library, not just the front-line reader services staff in serving the readers.

The basic services we provide are: orientation, information, operation of reading rooms (circulation, photocopying, reference), maintenance of bibliographic source tools (open-shelf collections, card catalogues, other guides to the collections). Some degree of each service is appropriately duplicated on each floor to prevent excess travel for the reader and to better integrate the reader services division.

Having stated a need for duplication, we must, however, qualify our recommendation by saying there are levels of each service which can be offered, and were our time and dollars used to duplicate routine work done elsewhere, no time would be left for more important work. There are times when a reader should be asked to go to a different post.

The Newberry takes pride in providing active assistance to users, but it must become more sophisticated about the exact definition of "active assistance." To do this, we must develop formalized policies

through the collaboration of administration and reader services staff. Saying "no" to someone is difficult, and we must not be arbitrary or confused about the types of services offered. A directory of services offered at the Library is recommended; see the Service Points, Traffic and Communications Task Force report, Appendix IIA, pp. 20-21.

ISSUE: Location and Arrangement of the Card Catalogues

PROPOSAL: The card catalogues are the major bibliographical tool for access to the Library's collections, and therefore should, in principle, be centrally located in the Reference and Bibliographical Center. However, it would be irresponsible to arbitrarily place all catalogues in the R&B Center without evaluating each special catalogue on its own merits. The subject content, completeness of coverage, potential for future growth, and format of each catalogue was analyzed by the Task Force on Bibliographical Access. We believe this extensive survey to be work thoughtfully done. (Please see Appendix IIB) In this final report we will highlight only the most important catalogues and the PSST recommendations for them. When this report fails to address one of the catalogues surveyed by the Task Force, it may be assumed we endorse their recommendation.

OLD OFFICIAL CATALOGUE

We endorse the current project of pulling the main entry cards from the old Official Catalogue which have on the verso the only record of tracing for the item, and the authority cards. These cards are being assembled into a control catalogue in Technical Services.

This will be a closed file corresponding to the closed AACR I Public Catalogue.

NEW OFFICIAL CATALOGUE

In the prior arrangement of the building, Technical Services was one floor away from the Public Catalogue. The new location of Technical Services next to the card catalogue room in the R&B Center makes the requirement for a duplicate AACR II Official Catalogue unnecessary. We endorse the practice of filing the main entry card with tracings directly into the AACR II Public Catalogue. We encourage an authority file be maintained in Technical Services.

NEW AND OLD PUBLIC CATALOGUES

It is essential to maintain the present dictionary arrangement of the card catalogue. With the advent of AACR II, we already have two separate card catalogues. A divided catalogue, i.e.subject cards separate from main entries/titles, would create yet two more catalogues to search. However, we do not recommend the interfiling into the Public Catalogue of the special catalogues being transferred into the R&B Center. Instead, these should be located at the end of the AACR I Public Catalogue. These are specialized finding tools, and should remain separate until each has been individually considered for content and efficiency of use in their present form. In some cases smaller, closed files might be duplicated in hard-copy form and the cards discarded. Colored drop cards should be placed intermittently throughout the Public Catalogue to alert readers to catalogues not interfiled with the dictionary Public Catalogue.

MAP CATALOGUE

The PSST recommends that the map catalogue stay a separate unit from the Public Catalogue. The arrangement of the entries allows researchers a concise tool for map access. Interfiling of these cards in the Public Catalogue would disperse special subject groupings among non-map entries.

We recommend the reclassification of all maps into the Library of Congress MARC format on OCLC. Such a reclassification project is a good candidate for grant funding because of the significance of our collection. Reclassification would result in uniformity of access and entries. Also, an on-line product would be available when OCLC terminals are available on all service floors (i.e. second through fourth) of the building.

Regarding the question of where to locate the catalogue, there are compelling arguments for both the third and fourth floors. The catalogue is usable on the third floor where general reference assistance is available. The advantages of having this tool in the area where the maps are serviced and where the curatorial staff for the collection have their offices favor location on the fourth floor. The first preference of the PSST would be duplication of the map catalogue, with placement of one on each floor. The second preference would be the placement of the original and only copy of the catalogue on the third floor.

MANUSCRIPT CATALOGUE

Access to manuscript materials is through the department of Special Collections. Because manuscripts are unique items, i.e., the

only copy in the world, application is and should be required to use any manuscript material. Users are next interviewed by the appropriate staff member to better understand the type of use for which materials are being requested.

The nature of the material decrees that the cataloguing must be original. Generations of in-house procedures in an independent library and the small staff allocated to process and catalogue the massive manuscript collections have produced a catalogue with idiosyncratic entries. The result is a catalogue comprised of many types of entries, most not equivalent to the standard catalogue cards format used in our Public Catalogue. There are also separate topic drawers (e.g., American Literary Manuscripts, European Manuscripts) with entries not in the main body. Without curatorial assistance, manuscript readers would see the major alphabetical sequence and not subsections, missing holdings. A large portion of the Modern Manuscript collection is uncatalogued and unmentioned or only cursorily referred to in the catalogue. Thus, this is not a "catalogue" in the normal sense of the term, but a sophisticated hand list. Frequently the cumulative knowledge of a curator is not represented in the catalogue. The chances for a reader being misinformed or not fully understanding our holdings are great. This tool should be used only with the assistance of the staff who have knowledge of the collections.

We recommend, therefore, that this tool remain on the fourth floor in Special Collections with the manuscripts staff to serve readers. Duplication of the card catalogue as it stands is not recommended, since the use of it requires special assistance, and

placement of a duplicate catalogue on the 3rd floor would only compound the confusion outlined above, not improve access. There are notebooks which detail the catalogued collections. We recommend that copies of the Modern Manuscript notebooks be made and put into post bindings and placed in the R&B Center. It is also recommended that the manuscript main entry cards generated for NUC reporting be interfiled in the Public Catalogue.

ISSUE: Open Shelf Collections: Reference & Bibliographical Center (R&B Center)

PROPOSAL: The principle behind the creation of the Reference and Bibliographical Center is the centralization of our bibliographical resources. Taking that principle and applying it to the location of reference materials throughout the Library, implies a hierarchical selection process. Every title should be considered first for placement in the R&B Center, leaving a minimum number of tools to be placed in reading room and other satellite collections. Exceptions to this principle will, of course, exist. The selection process must ensure that each tool is analyzed on the basis of whether it is necessary to read something, or to find something. Frequency and efficiency of use must be considered in selecting the shelf location.

Selection of reference tools for the various open-shelf collections should be made by the reference librarian, subject bibliographers, curatorial staff, and other appropriate staff and fellows. A committee should be established by early September, with title designations to be made by November 1, 1984. These people

should also be responsible for the continuous growth and weeding of collections, since no reference collection should be static.

A specific policy and procedure for charging R&B open shelf materials to satellite collections, carrels, and project centers should exist. The decision to transfer the material should be made by the head of the R&B Center, and a circulation system should be instituted to maintain constant awareness of the material's location.

The creation of the R&B Center underscores the Library's historical emphasis on reference. To aid in collection development in this area, it is urged that the Reference Librarian be given the status of bibliographer for the selection and designation of general reference materials effective immediately. It is also urged that a budget line for general reference materials be established for fiscal year 1985/86. This budget line will be independent from the specific subject collection funds such as Ayer and Wing, and will not prevent the purchase of important reference works with those funds.

The R&B Center will contain, when full, approximately 18,000 volumes of reference material. Some of the important reference tools which will be in this collection are now, or soon will be, unusable because of deteriorated condition. Funds must be set aside for filming, copyflow, or replacement. Each work needs to be evaluated individually to determine the appropriate solution.

There is a possibility that security control of open-shelf materials (i.e., preventing removal from the room) will be difficult. Some way to control the departure of materials needs to be devised. If a security problem develops in the next year or so, a tattle-tape or other system should be reconsidered.

OPEN SHELF JOURNAL COLLECTION

Besides the reference book collection in the R&B Center, there will be a display of the most current issues of selected journal titles. The same group making the selection of the open-shelf books should make major recommendations for the size and content of the collection. A survey should be taken in September of staff, fellows, and scholars to determine journals selected. A committee of the Library Services Group should draw up and administer the questionnaire.

Journals should be on display for one month, or until the next issue of the series appears. If a bibliographer wants a journal during its open-shelf period, it may be requested via the circulation system for one day and returned to the shelf. This is not a routing system; the current routing system should be abolished. A system is needed that would have as its objectives locatability, prevention of loss, and timely access for users. A journal accessions list should be started to advise bibliographers, staff, and readers of newly arrived issues. Such a system should consider the efficiency of the bibliographers job as well, though. We must prevent a bibliographer with many journals to review from having to fill out 50 to 60 call slips, and a new slip attachment to the journal should be developed so bibliographers will know what other reviewers are recommending for purchase. The slip attachment that travels with the journal to the order department should contain the full bibliographical citation to eliminate the need to hold journals in Technical Services.

A better system of marking unbound journals is needed. Usually, the ownership stamp is placed on the cover when the issue is received, and is clearly visible. Some journals, however, such as "Fine Print," are not stamped, and brightly colored covers can obscure the stamp. Perhaps the decision to place a small stamp within the volumes (such as is used on maps and manuscripts) might be considered for these special cases. With the exception of serial bibliographies, bound journals should not be placed on the reference open shelf.

ISSUE: Satellite Collections

PROPOSAL: Satellite collections are smaller, open-shelf reference or research collections located in reading rooms or research centers. The PSST unanimously endorses placement of some, necessary reference materials in each reading room, and appropriate research tools in Center and Project areas. The hierarchical selection process referred to under the heading of the R&B Center Open-Shelf collection is again recommended. The aim is to minimize the number of locations for reference books. So, we underscore the fundamental rule that every title be considered for the R&B Center first. Next, we pose the option of placing duplicate copies of major reference tools in the reading rooms. In some instances, selective purchase of second copies of important titles is appropriate. Finally, since some research tools must be used with the materials paged from the stacks, they should be located for efficiency of use by researchers, even when only one copy is owned by the Library. The distinction cited earlier, between efficiency in finding and reading material should be the guiding principle in this selection process.

Satellite collections exist in the research centers that contain uncatalogued materials. The materials were purchased through grants for use in specific Library projects. We recommend that all in-scope, non-reference material in these collections be catalogued and added to the Newberry's permanent collections, regardless of the means of acquisition. Materials relating to our collections but not in scope and acquired during specific projects are representative of research done here and should be included in the project's archives. Out-of-scope materials with no archival relevance or continuing usefulness should be discarded or sold.

ISSUE: Reclassification of Reference Materials

PROPOSAL: The PSST views the reclassification of all open-shelf reference materials into the Library of Congress system as a high priority. The open-shelf collections should be reclassified in the following sequence:

1) Reference and Bibliographical Center: The current collection (approximately 8,000 volumes) is already reclassified, and following expansion (to roughly 18,000 volumes) it is logical to finish our largest reference collection first. It is important that there be only one classification shelving sequence in the department for ease of use by staff and readers.

2) Local and Family History Research Collection: Because this will be a very large collection, designated by the Administration to be roughly 8,000 volumes, this collection should be reclassified next, because it will get use by inexperienced readers and must be

easy to follow on the shelf. Because of heavy use, constant reshelving by the staff will be required and one call number sequence is essential.

3) Special Collections: This collection will be smaller than the other reading room collections and therefore can better accommodate numerous call number sequences. It should be reclassified after the Local and Family History collection is done.

4) Main Reading Room: Again, this is a small collection which will need reclassification but because of its size is not a first priority.

5) Remaining satellite collections: Especially those in centers which are not yet catalogued should be classified.

The PSST recommends that the reclassification of open-shelf reference materials be done within one year, and that additional staff be hired to complete the project. It is understood that the current staff in Technical Services is not adequate for this project. We therefore urge the consideration of the following staffing options:

1) In cooperation with, and under the direction of the head of Technical Services, a temporary reassignment of some staff should be undertaken for OCLC searching and other preliminary work. Currently, Technical Services does make use of non-Technical Services staff to do such work, so the precedent is set and direction procedures exist. Technical Services staff would be responsible for pulling cards and changing both tracings and numbers since doing so requires special training.

2) Hire additional part-time librarians with experience in cataloguing.

3) Delay Official Catalogue main entry project and use existing Technical Services staff.

As a part of reclassification, a designation on card catalogue cards is needed to indicate an open-shelf location. The marking mechanism should be reversible to allow for the occasional return of materials to the stacks. If no other designator, mylar jackets could be used.

ISSUE: Hours of Services

Currently we admit readers with assigned spaces from 8:30 a.m. to 10:00 p.m., Tuesday, Wednesday, and Thursday, and from 8:30 a.m. to 6:00 p.m., Monday, Friday, and Saturday. The general readership is excluded on Monday; on all other days they are admitted beginning at 9:00 a.m., with closings at 10:00 and 6:00 p.m. (readers must leave twenty minutes before closing). The entire building is closed on Sunday. After evaluating demands for services, efficient use of funds, and schedule of staff, we find the current hours workable, but we propose a few refinements.

PROPOSAL: We propose that the building remain open to all reserve readers during the present hours as stated above, and that they be allowed access to their carrels, but that the reading rooms close at 8:00 p.m. The following discusses each separate section of reader services individually.

REFERENCE AND BIBLIOGRAPHICAL CENTER

Monday: The room would be open and the lights on. There would be no attendant at the duty post. Reference staff working on Monday will be present to provide some surveillance of the space, either by making

rounds or bringing work to the space. No telephones at the service desk will be answered, and no in-person reference services will be formally supplied.

Tuesday through Thursday: The room would open at 9:00 a.m. At 8:00 p.m. the doors would be locked and the lights will be put out.

Friday and Saturday: The room will open at 9:00 a.m. and the doors locked and lights out at 5:00 p.m.

There might be a need for the staff to remain one extra half-hour to reshelve materials and prepare for the next day. Only experience will indicate whether this is indeed necessary.

MAIN READING ROOM/LOCAL AND FAMILY HISTORY

The reading room would be closed on Mondays.

Tuesday through Thursday: Open 9:00 a.m., closed at 8:00 p.m.

Paging would stop at 7:30 p.m.

Friday and Saturday: Open 9:00 a.m., closed at 6:00 p.m.

Paging would stop at 4:30 p.m.

The PSST sees no way to transfer readers from the Reading Room to the R&B Center for evening hours. The circulation post, reshelving area, and the Local and Family History reference tools and microforms cabinets are all located on the second floor. Transferring the readers and their materials upstairs at 5:00 to 6:00 p.m would be too complex. The R&B Center is not a reading room; it will be actively used as a reference facility, and seating is not ample.

SPECIAL COLLECTIONS

The Study Team is divided on the proposal for Special Collection hours. The point of disagreement is evening hours. One side argues that it is desirable to provide our readership evening access to the materials in Special Collections, facilitating a uniformity of access. The other side argues that the nature of the materials raises significant security questions in the context of night access, especially insofar as it establishes a questionable precedent. These are conflicting but not necessarily exclusive philosophies of service. One side views access as the most important goal, the other focuses on proper procedures to follow for the handling and security of rare materials. One side feels that it is desirable to propose opening Special Collections one evening a week, the other that rarities should not be available after most of the curatorial and security staff have left for the day, and hence recommends continuing the current practice of closing at 5:00 p.m. All members of the PSST agree that the implications of longer Special Collections hours need to be considered seriously. For proper use of the Rare Book Room and its materials, adequate staffing must be available. The Study Team does not recommend the extension of evening hours without the proper additional staff coverage for both day and evenings. All PSST members agree that if Special Collections were to be open at night, the first step would be the implementation of a designated, experimental time period to evaluate the level and types of use, and, in turn, the staffing and security measures necessary.

CARREL AREAS/RESERVE READING AREAS

We propose that these readers continue to be admitted to their reserve areas at 8:30 a.m. with access to the reference area and reading rooms beginning at 9:00 a.m. These readers may remain in their study areas until the building closes, but the reading rooms and R&B Center will close at 8:00 p.m.

ACCESS TO MATERIALS AFTER HOURS

It is our understanding that after hours and on Saturdays the offices, centers, and some departments will be locked, and the system of page master keys in use for many years will be dropped for reasons of security. To page materials charged to these spaces at night and on Saturdays, it has been proposed that in the evenings a master key be left at the kiosk or with the Security Officer. If a request is made for items charged to one of these locked spaces, the security staff would escort the page and wait while the item is paged. This viable, but cumbersome procedure presumes, moreover, the existence of an available security person at night. It must be decided whether these regular requests for already charged materials are sufficiently important to necessitate accommodation, or whether the reader will have to be told that the item is already charged and unavailable. Certainly there will be some instances when the reader will have a good case for seeing the material.

III. STAFFING AND CHANGE

ISSUE: Staffing of Reader Services

The hours of service having been defined, it remains to determine what level of service we wish to provide, and then to specify staffing levels. Any attempt to prioritize the positions recommended is difficult since it is hard to say which departments should take precedence over the others. In the Main Reading Room/Local and Family History, the heavy readership will require extra staffing. With the new Reference & Bibliographical Center, the Library has created a central place to which most readers will be sent initially and return to repeatedly throughout their stays. In Special Collections, the present staffing level is inadequate to respond to the paging load and the security and preservation requirements inherent in rare materials. We realize that the current building project and the non-profit fund raising climate are not conducive to grandiose schemes. We hope that if the Library cannot fulfill all staffing requests this year, it can plan for the next two or three years, allowing department heads to conceive a workable picture of the future. This report stops short of making specific job descriptions and head counts. We do not claim to understand the inner workings of all departments, and lack representation from every Library Services section. The following staffing recommendations represent the most basic level of analysis, and we hope the imagination and experience of the administration and the department heads can carry our recommendations further.

In formulating our recommendations we have linked the number of hours a department is open to the posts to be covered, and services

offered. There are three standards of service: essential, basic service; desirable, good service; and increased, better service. We will primarily address the essential, basic service level. Recommendations for positions to be added in our greener future follow this more practical section.

REFERENCE AND BIBLIOGRAPHICAL CENTER

This department will have a reference desk duty post, and will cover interlibrary loan, phone reference, card catalogue and open-shelf assistance, general collections reference correspondence, permissions, user orientation tours, and assorted special projects.

The present proposal for hours of service to the public would require 51 hours per week of reference desk coverage. There are three staff members presently working in the department. Each takes two hours a day at the desk for a total of 30 hours coverage. With additional responsibilities off of the desk, this seems a reasonable schedule. 21 hours of desk coverage remain. At the rate of two hours of desk coverage a day, two more individuals covering ten hours apiece will be required to complete coverage. The nature of the work requires that at least one of the people be an MLS with reference experience. We suggest an internship be established with a local library school for one more position. The usual duration of an internship is one year. In addition, this department will require one half-time person for clerical responsibilities such as filing, photocopying, statistics, reshelving, etc. Because this will be the bibliographical and reference hub of the Library, we encourage due consideration and prompt attention for this important, highly visible section.

LOCAL AND FAMILY HISTORY DEPARTMENT

The creation of the larger open-shelf collection, and the fact that the researcher here tends to be inexperienced implies a need for a reference post in the LFH reading area. Again, this room will be open 51 hours; however, the reference post will be staffed for only 40 hours. Currently two staff members are in the department. Responsibilities include bibliographical selection, reference correspondence, reader assistance, special files maintenance (ex. vertical file), community group relations, and special projects. One staff member covers the desk 12 hours a week, the other 8 hours a week for a total of 20 hours coverage. This leaves 20 hours of coverage. An internship with the University of Chicago Graduate Library School is presently underway and will provide a half-time staff member to cover 10 hours of desk time. This leaves a need for 1 more person to cover the last 10 hours at the post.

MAIN READING ROOM

This department is responsible for circulation of all general collection material, including LFH books. A large amount of photocopying is done for readers, and six levels of bookstacks are maintained. The present staff is generally adequate for the 51 hours of service required to cover the circulation post and paging duties. However, the increased open-shelf collection for LFH and the expected increase in circulation make an additional half-time staff member essential for shelf maintenance.

SPECIAL COLLECTIONS READING ROOM

Special Collections is responsible for the operations of the Rare Book and Map Reading Rooms (including circulation control, paging, reshelving, surveillance, reference assistance), all rare book, map, and manuscript correspondence, collection development in these areas, cataloguing of maps and manuscripts, tours, Show and Tells (display of rarities with accompanying talk), bibliographical selection, related in-person and phone reference, photocopying, maintenance of four levels of the bookstack building, Newberry Library Archives, artifacts, exhibits, exhibit loans, maintenance of special files, and numerous special projects. At this time, this department keeps pace with only the most immediate needs of our users and collections. Other tasks are not attended to. The department is at present staffing levels unable to keep pace with paging and desk attending. There are currently two pages Tuesday through Friday, and one on Saturday. At present there is the equivalent of one and one-half people for the service desk. All of these staff members have behind-the-scenes duties as well. It is recommended that one and one-half more FTE be added to deal with paging, desk attending, and clerical tasks. The areas of responsibility not now attended to will be discussed in the section on future new positions.

If Special Collections were to extend its hours for the evening, one desk attendant, one page, and one senior staff member would be required. A senior staff member is requested because it is inappropriate for junior staff to have responsibility for closing procedures, security, and policy issue interpretation. These staff members would have to overlap with the daytime staff both for

continuity in service and policy, and to ensure proper departmental communication.

ORIENTATION/ADMISSIONS POST & BOOKSHOP

The staffing of these posts was discussed earlier in this report. See page 2 of this report.

TECHNICAL SERVICES

The staff of this department was discussed earlier in this report. See page 18 of this report.

VOLUNTEERS

Over the years, the Newberry has made good use of volunteers. However, the nature of work appropriate for volunteers needs clarification. Because we cannot enforce schedules for unpaid time, volunteers should never be in scheduled, front-line positions. It is important that volunteers be thoroughly and adequately trained for their jobs. Tasks assigned to volunteers should not be ones with important deadlines, rather they should be of the sort that can be picked up and put down. It is recommended that the volunteer program be maintained, but reevaluation of the program is necessary. The issues of recruitment, training, and integration must be restudied.

BIBLIOGRAPHERS

Bibliographers, their numbers and subject coverage, were not discussed by this group. We hope that the soon to be appointed Collections Development Librarian will be a pivotal, strong focus for

the collecting policies. The PSST agrees that the collections and their development are the groundwork upon which public services rest. We cannot serve our readership effectively if the collections with which we serve them with are not of the uppermost concern.

The PSST recommends the reestablishment of the Bibliographical Committee to better coordinate selection of materials. A review of our collection policy and its parameters is crucial, and long overdue. This must be one of the first priorities of the Collections Development Officer.

NEW POSITIONS

This section lists positions which are not recommended for the immediate future, but rather represent long-range planning.

Newberry Library Archivist: Archival material has remained unprocessed for at least one decade, maybe two. It must be organized and a guide created. A full-time archivist or paraprofessional with experience is needed in the beginning, with the position eventually evolving to half-time. The archivist would also assume responsibility for the archives from the research and education programs.

Cataloguers of Modern Manuscripts: Gigantic sections of this material remain uncatalogued, and many now catalogued need more indepth treatment. To begin, two full-time MLS cataloguers with experience are required. The evolution of the manuscript collections policy would decree the future staffing needs.

Exhibits Coordinator: Exhibitions are an important way of drawing new public into the institution. To assure a better program, ensure better planning, and have more consistent end results, we suggest making this a separate Library Services section reporting directly to the Director of Library Services.

Stacks Manager for Special Collections or Entire Library: At present only the general collections has a stacks manager. There is great need for stacks management for the rare materials. The potential for expansion of the responsibilities of the present stack manager should be considered.

Conservation Bibliographer: This position is needed to assess better the conservation needs of the Library's collections as a whole and to develop a more systematic approach to treatment. A method of identifying the most important items in the collections in need of treatment is essential to more appropriately use the time in the conservation lab and bindery. The Conservation Bibliographer should understand both the treatment processes available, and know books sufficiently well to make proper assessments. This employee should be part of reader services and placed so they see materials as they are circulated and can observe stress points first hand.

Subject Specialists: Several major areas of subject coverage are not represented among the subject specialists on staff. Desiderata for new Bibliographers, or for development by existing staff, are: Latin America, Italian Renaissance, Victorian Literature, British History,

Twentieth-Century America, Church History. This is a staff development and collection development issue, and it should be addressed in the immediate future.

STAFF SHARING

Staff sharing should be encouraged as a supplementary activity for interested and qualified staff and fellows. Staff sharing could be done in public services duty posts (usually reference); or in any other part of the Library. However, we strongly advise against staff sharing to cover duty posts in the face of inadequate budget resources. Shared people are hard to schedule since their "home" departments claim first priority on their time. Staff sharing should be viewed as a major element of staff development, not as a solution to staff shortages. The time spent to train a shared person in a new department, and the time lost in the original department, will quickly translate into fewer, not more dollars for the Library. Reciprocity should be a formalized part of any staff sharing, to allow the donor department a means of covering its full range of duties.

STAFF DEVELOPMENT

In the beginning stages of this study, the officers of the Library were interviewed by the PSST. The questions touched on all elements of the study to follow. In one interview, public services philosophy was discussed. The interviewee stated that the key to good public service is a staff with knowledge of the collections and knowledge of the subjects of the collections. With this in mind, we are eager to see our already-knowledgeable staff align their personal

and professional interests with the goal of the Library to provide the best service possible. We would like to see the staff take an active role in the development of their specialties. The staff knows they are supported by the Library in efforts to pursue their interests, but often become wound up in daily responsibilities. It simply must be impressed upon the staff that continuing education is part of their job, and they are not neglecting their work while honing skills. It is the staff's own responsibility, not the administration's, to take the initiative, but periodic vocal encouragement is needed.

In addi ion to the individual staff development proposals, there are Library-wide proposals which could be beneficial. It might be useful to arrange staff seminars in time management and research skills. We should consider as an institution the amount of time lost in meetings, walking to copy machines, and other tasks which waste time and energy. The PSST encourages the Library to plan for the creation of a Personnel Officer, but recognizes that some currently confusing personnel matters may be handled by other means before this position is created.

We recommend the following:

1. A new, comprehensive employee orientation program should be created. This should include an introduction to facilities, policies, and history. The proposed film on the history of the Library mentioned earlier for reader orientation would be a valuable tool for staff as well.

2. In combination with the above, but not in place of it, the Staff Handbook needs revision. This is an urgent need.

3. Because the structure of the organization does not provide the typical corporate option for advancement and job grading, an alternative is needed to communicate to employees the administration's recognition of their seniority and quality of service. Titles appropriate to responsibilities, especially curatorships, remuneration equivalent to that of expertise, must be included. A cost of living increase should be standard for all employees, and a system of merit increases should reward excellence in service.

4. A way of better informing staff of existing funds designated for staff development must be created. The methods of application for these funds, clear definition of who qualifies for categories of funding, and guidelines for disbursement should be an integral part of the Staff Handbook. However, the communication of such guidelines should not await the completion of the new Handbook.

5. We recommend the consideration of additional educational endowment funds for the staff to be created with the help of the Development Office. In addition, clarification of what existing funds may be used for professional education is needed.

6. Institute a bi-weekly lecture program similar to the colloquia directed by the Research and Education Office to discuss issues of library management and operations. Some topics could be included in the present colloquium series; topics which are more specifically library management would be inappropriate for readers who attend colloquia regularly. Examples of topics for discussion would be OCLC instruction, microcomputers, book handling, cartography, bookbinding, history of printing, new conservation techniques, current staff projects such as the processing of a new collection, publication, etc.

This program should have both in-house speakers and speakers from other institutions.

7. Arrange tours to local libraries and other places of professional interest for the staff.

IV. MISCELLANEOUS RECOMMENDATIONS

ISSUE: OCLC Terminal Access

PROPOSAL: An OCLC terminal should be available at the R&B Center service desk by January, 1985. Terminals should eventually exist in all reading room areas.

ISSUE: Book Return Stations

PROPOSAL: The current practice of having a table surface designated for the deposit of materials is unsatisfactory. A new way of returning materials from the centers and carrel areas must be designed. Loss is common under current practice, and the physical security of the items can be jeopardized by the unusual proportions these piles take.

The Conservation Department should be consulted to determine whether a book container exists or can be designed which satisfies conservation and security requirements. These containers should be uniformly located, identical in appearance, and clearly labeled as book return stations.

The Main Reading Room paging staff should make rounds twice daily to check the stations, and any materials from Special Collections should be returned to that reading room for discharging.

ISSUE: Call Slips

PROPOSAL: Different color charge slips should be printed for the Reference and Bibliographical Center and Special Collections reserve materials. The present practice of stamping each charge slip with "Special Collections" in two places is unworkable.

ISSUE: Telephones

PROPOSAL: It is essential that the telephones at the R&B Center service desk have buttons for handling numerous calls at once. We realize the button phones are more costly, but the activity at this post requires them.

ISSUE: Switchboard Orientation

PROPOSAL: A good orientation and guide for the switchboard operators are necessary for a smooth flow of information and an impressive introduction to the Library for those whose first contact with us is by telephone.

ISSUE: Opening after the Renovation in October

PROPOSAL: We recommend a few days of down time before our official reopening to allow staff members time to orient themselves to the new operational procedures which the newly designed spaces and rearranged equipment will require. Were Library access limited to those on fellowship, somewhat like the last weeks of August, staff members would be able to prepare properly for reopening, and thus make a very positive impression on our returning readership.

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